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MAYOR

TOWN OF EAST HARTFORD

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PURCHASING DEPARTMENT

WWW.EASTHARTFORDCT.GOV

TOWN OF EAST HARTFORD, CT INVITATION TO BID

BID # 15-19

RE: **R.F.P.** -REVALUATION PROGRAM FOR OCTOBER 2016 GRAND LIST

INFORMATION AND SPECIFICATIONS ARE AVAILABLE AT THE ABOVE OFFICE. THERE WILL BE A MANDATORY PRE-BID CONFERENCE AT TOWN HALL, CONFERENCE ROOM "B", SECOND FLOOR, 740 MAIN ST. EAST HARTFORD, CT ON WEDNESDAY, APRIL 15, 2015 @ 10 A.M.

SEALED BIDS WILL BE RECEIVED AT THE OFFICE OF THE PURCHASING AGENT, 740 MAIN ST., EAST HARTFORD, CT. UNTIL FRIDAY, MAY 15, 2015 @ 11 A.M. AT WHICH TIME THEY WILL BE PUBLICLY OPENED AND READ.

INFORMATION AND SPECIFICATIONS ARE AVAILABLE AT THE ABOVE OFFICE OR ON THE TOWN OF EAST HARTFORD BID'S WEBSITE AT [HTTP://WWW.EASTHARTFORDCT.GOV/BIDS](http://www.easthartfordct.gov/bids)

A FIVE PERCENT (5%) BID BOND WILL BE REQUIRED OF ALL BIDDERS AND A ONE HUNDRED PERCENT (100%) PERFORMANCE AND PAYMENT BOND WILL BE REQUIRED OF THE AWARDED BIDDER.

THE RIGHT IS RESERVED TO REJECT ANY AND ALL BIDS WHEN SUCH ACTION IS DEEMED TO BE IN THE BEST INTEREST OF THE TOWN OF EAST HARTFORD, CT

MICHELLE A. ENMAN
PURCHASING AGENT
(860) 291-7270



TOWN OF EAST HARTFORD, CT.

STANDARD INSTRUCTIONS FOR PROPOSAL

1. Sealed proposals will be received by the Purchasing Agent until the date and time specified on the title sheet. Proposals received later than the date and time specified will not be considered and will be returned unopened. **Proposals will not be accepted via fax or e-mail.**
2. All proposals will be opened and recorded and are subject to public inspection. Firms may be present or be represented at all openings.
3. Municipalities are exempt from any sales, excise or federal taxes. Fees must be exclusive of taxes and will be so construed.
4. The Town of East Hartford reserves the right to reject any or all proposals or any part of any or all proposals and to waive any informality when such action is in the best interest of the town and also reserves the right to extend an awarded proposal by mutual consent and negotiate any terms, conditions and prices if it is in the best interest of the town.
5. Firms should familiarize themselves with the items and/or conditions set forth in the Request for Proposal specifications. Failure to be informed will not be accepted as an excuse from fulfillment of the requirements.
6. In case of an error in the extension or addition of prices, the unit price will govern. The Town will not be subject to any price increases after an award if not part of the original proposal terms.
7. For professional services - a selected town committee will evaluate all responses and make a recommendation to the Mayor. **If deemed necessary** by the committee, an interview may be required as part of the selection process.
8. Please include a corporate resolution with your submittal. Sample formats for Corporations and Professional Corporations, Limited Liability Company and Partnerships (including Limited Partnership and Limited Liability Partnership) are attached in this packet.
9. Per Town Ordinance Sec. 10-10 (d): The Town shall not award a bid to any bidder who owes a delinquent tax to the Town. Bidders certify by virtue of their signature on the bid sheet that neither the bidder nor any business or corporation in which the bidder owns and interest is delinquent in tax obligations to the town.
10. The bidding entity is required to provide evidence from the Connecticut Secretary of State that they are in good standing and qualified to conduct business in the State of Connecticut.

BID # 15-19

*REQUEST FOR PROPOSALS
FOR THE DEVELOPMENT AND IMPLEMENTATION
OF A REVALUATION PROGRAM
WITHIN THE TOWN OF EAST HARTFORD, CT*

The Town of East Hartford is undertaking a program to update the values on all real property, pursuant to the Connecticut State Statutes. Contractors interested in providing the revaluation services, set forth in the attached specifications, are invited to attend a mandatory conference at the **Town Hall, Conference Room "B", Second Floor, 740 Main Street, East Hartford, CT on Wednesday, April 15, 2015 at 11:00 a.m.**

The purpose of this conference is to clarify the specifications and answer all technical questions. Written inquiries may be submitted by Contractors before the preconference date. Contractors desiring to provide services according to the specifications must deliver (4) copies of their Proposals to Purchasing Department, no later than Friday, May 15, 2015 at 10:00 am. At this time, the Proposals will be opened and the names of the proposers announced.

All information pertaining to the Contractor's technical and management approach to completing this project, as well as the proposed cost, timetable and staffing plan, shall be presented in the Proposal. The Proposal must address, at a minimum, each of the issues set forth in the Request for Proposals in order to be considered responsive. **DO NOT SUBMIT A COPY OF THIS REQUEST FOR PROPOSALS AS PART OF YOUR PROPOSAL.** Any Proposal which does not respond to each issue in the Request for Proposals shall be rejected by the Purchasing agent.

In addition to addressing each of the items in the specifications, the Contractor must submit as part of its Proposal the following information:

1. A letter of transmittal signed by the individual authorized to negotiate for and contractually bind the Contractor stating that the Proposal is effective for at least sixty (60) calendar days from the deadline for the submission of Proposals.
2. The Town reserves the right to request current financial information relative to the Contractor's financial stability.
3. A list of the Connecticut municipalities for which the Contractor has completed revaluation programs.
4. A list of the revaluation contracts for which the Contractor is currently committed.
5. Written assurance that the revaluation will meet Office of Policy and Management certification requirements and standards as adopted under provisions of Connecticut General Statutes, Section 12-62i.

The criteria upon which Proposals will be evaluated include, but are not limited to, the following:

- 1 Directness to response to the specifications.
2. Experience of the Contractor with other revaluation programs and the experience and qualifications of the staff to be assigned to this particular project.
3. Cost of the project will be considered, but will not be the sole basis for evaluation. Contractors must demonstrate that they are qualified and responsible.
4. Project timetable.
5. Range and completeness of the public information program.
6. Willingness to assist the Assessor and staff in understanding the project as it progresses and a commitment to train the Assessor and staff.
7. Experience of the Contractor with CAMA software in general, and willingness to work in conjunction with our Vision 6.5 CAMA system.

***SPECIFICATIONS FOR A REAPPRAISAL AND REVALUATION
EAST HARTFORD, CONNECTICUT***

SCOPE OF REVALUATION

The project shall be for the complete update reappraisal of all taxable and exempt real estate within the corporate limits of the Town of East Hartford, Connecticut, as of October 1, 2016, as described below.

1. All taxable real estate - land, buildings, and improvements.
2. All exempt real estate - land, buildings, and improvements.

All work to be carried out in this project and all forms, materials, and supplies utilized in this project shall conform to and be executed in accordance with the requirements of the Secretary of the Office of Policy and Management and the Connecticut General Statutes pertaining hereto, and shall be subject to the direct supervision and approval of the Assessor of the Town of East Hartford, Connecticut.

The value to be determined shall be (70) percent of the full fair market value as defined in Section 12-63 of the Connecticut General Statutes and shall be based upon recognized methods of appraising.

TOWN DATA

1. The last physical revaluation was effective as of October 1, 2006.
2. The East Hartford population is estimated to be 50,000.
3. The area of the town is 18.8 square miles.
4. The Town will continue to utilize the Vision 6.5 CAMA software package. The database is current to October 1, 2014.
5. Property account profile: see addendum

The Contractor shall value all newly constructed improvements created prior to October 1, 2016, or those incomplete as of this valuation date, and these parcels shall be included in the contract price and valued in the same manner as stated above, and as provided hereinafter.

I GENERAL CONDITIONS

A. CONTRACTOR

1. Certification

Each company, corporation, partnership, or individual, hereinafter termed Contractor, must hold from the time of submission of the bid through the completion of all work, a valid Connecticut Revaluation Company Certificate pursuant to Section 12-2c of the Connecticut General Statutes.

2. Proposal

Each Proposal submitted shall include a copy of the Contractor's Connecticut Revaluation Company Certificate, shall itemize the Contractor's qualifications and experience. The Contractor shall submit a complete client list of municipalities to which it has rendered services during the last five years and the nature of those services. The Proposal shall also include a statement showing the number of years the bidder has actually been engaged as a company, corporation, partnership, or individual specializing in municipal tax revaluation services.

The Company shall not make any changes to this Request for Proposal as presented. The Proposal should be in the same format as this RFP. Exceptions to the RFP, if any, shall be clearly identified in a separate section.

The Contractor, in its Proposal, must demonstrate a willingness to become familiar with and work with Vision 6.5 CAMA system.

B. PERSONNEL

The Contractor shall provide experienced and qualified personnel in compliance with the requirements of the Equal Employment Opportunity provisions of both the federal and state governments. The company shall adhere to all other legislation relating to employment procedures.

1. Qualifications of Personnel

All personnel assigned to this project shall be subject to approval of the Assessor and shall be subject to removal from this project by the Contractor upon the written request of the Assessor.

2. Minimal Qualifications

a. Project Manager or Supervisor

The administration of this project shall be assigned by the Contractor to a project manager or supervisor who shall be certified by the State of Connecticut as a Revaluation Supervisor.

b. Reviewers and Appraisers

Reviewers and appraisers shall be certified under the Connecticut Revaluation Certification Program.

c. Data Collectors

Data Collectors shall have not less than six (6) months experience and training in this phase of a revaluation project. Any field person who does not meet the above qualifications must work under the direct supervision of an Appraiser, Reviewer or Project Manager, who is certified pursuant to Section 12-2b (C.G.S.). The Project Manager is required to notify the Assessor of the names, starting dates, qualifications, and field assignments of all Data Collectors. Minimum age for Data Collectors shall be twenty-one (21) years of age.

The Contractor shall exercise vigilance over the instruction and supervision of the Data Collectors, emphasizing the absolute necessity for the Data Collectors to help establish a good relationship with the property owners. Supervisory personnel will oversee the Data Collectors on no more than a one (1) to five (5) ratio through the data collection phase of the Project. The supervisor(s) and data collectors shall work closely with the Assessor to assure accuracy and reliability in data collection.

The Contractor shall give all Data Collectors clear and unequivocal instruction that they shall not discuss with any property owner or property occupant in the TOWN, the value or the assessment of any property they inspect, the property taxes being paid on the property being inspected or any aspect of the local budget or various TOWN issues or political matters.

3. *Identification*

All field personnel shall carry suitable identification cards supplied by the Contractor and signed by the appropriate municipal official. Such cards shall be laminated and include a recent photograph. All motor vehicles used by field personnel shall be reported to the appropriate municipal official, giving license number, make, model, year and color of vehicle.

4. *Conflict of interest*

No resident or TOWN employee shall be employed by the Contractor, except for clerical purposes, without prior approval of the Assessor.

C. PROTECTION OF THE TOWN

1 Bonding

A Bid Bond must be submitted with the bid and may be in the form of certified check or cashier's check Payable to "The Town of East Hartford" or a bond of a surety company authorized to transact business in the State of Connecticut. No checks will be returned until the bid is awarded. If you are the awarded bidder, your check will be held until it is replaced with a Guarantee of Performance bond. Bid Bond shall be 5% (five percent) of total bid price.

The **awarded Contractor** shall, to insure the faithful performance by the Contractor of the terms of this contract, furnish to the Town a performance surety bond in the amount of this contract, which bond shall be issued by a bonding company authorized to do such business in the State of Connecticut. Said bond shall be in a form satisfactory to and approved by the Town Attorney.

The performance bond shall be delivered to the Town prior to the commencement of actual work. This bond shall include the appeal requirements of these specifications. It is understood and agreed that upon the completion of the approved delivery to the Town of the Revaluation Project the performance bond shall be reduced to 10% of the value of the contract to cover the defense of any appeals as described below. This reduced amount of bond shall become effective after the Revaluation Project has been completed and has been approved by the Assessor and after the completion of the duties of the Board of Assessment Appeals. The reduced amount of the bond shall remain effective until a final resolution in the courts of any timely appeals taken from the doings of the Board of Assessment Appeals on the Grand List of October 1, 2016. Then there would be support for subsequent appeals at a cost of \$550 per day.

2 Insurance

For Insurance Requirements please see attached Addendum

3 Indemnification

Except as provided below, the Contractor agrees to defend and save harmless the TOWN, its officers, agents and employees against all claims, demands, payments, suits, actions, recovery, and judgments of every kind and description arising out of the performance of this Agreement, for personal injury or property damage brought or recovered against it by reason of any negligent action or omission of the Contractor, its agents, or employees and with respect to the degree to which the TOWN is free from negligence on the part of itself, its employees and agents.

The TOWN agrees to defend and indemnify and save harmless the Contractor, its officers, agents and employees against all claims, demands, payments, suits, actions, recovery and judgments of every kind and description arising out of any valuation disputes, or challenges to the methodology employed under this Agreement brought or recovered against it, whether based in contract, negligence or otherwise.

Neither party shall be liable to the other for consequential, indirect or incidental damages, including, but not limited to, loss of tax revenue or claims related to valuation of property, whether based in contract, negligence, and strict liability or otherwise.

In any event, the Contractor's liability for damages (except for damage to real or personal property or personal injury as provided above) under any theory of liability or form of action including negligence shall not exceed the total amount paid by the TOWN to the Contractor under this Agreement.

4 Penalties

- a. Failure by the Contractor to complete all work prior to the date specified herein, January 1, 2017, shall be cause for a penalty payment by the Contractor on request of the Assessor in the amount of one thousand dollars (\$1000.00) per day beyond the date of completion. For the purposes of this penalty only, completion of all work by January 1, 2017, is defined as follows:
 1. Completed property record cards with all measurements, listings, pricing, review, and final valuation.
 2. Assessment notices sent out, hearings completed for all those scheduled to be heard, and all calculations completed and ready for the Board of Assessment Appeals.
 3. Written certification by the Assessor that the Contractor has fulfilled all contractual requirements of said Project.
- b. This penalty, if applied, shall be deducted from the contract price. Delays occasioned by war, strike, explosion, acts of God, or an order of court or other public authority are excepted.

D. COMPLETION DATE AND TIME SCHEDULE

1. Awarding of Contract

Within a reasonable time after the opening of the Proposals, the Town shall award the contract for the reappraisal and revaluation Project. The Town reserves the right to reject any and all bids as previously stated.

2. Signing of Contract

Within thirty (30) days after the receipt of notice of acceptance by the Town of its Bid Proposal, the Contractor shall execute with the Town the contract upon the basis of these Specifications for Update Reappraisal and Revaluation.

3. Changes and Subletting of Contract

a. Changes

Changes in these specifications for reappraisal and revaluation in the contract will be permitted only upon written mutual agreement of the Contractor and the Town.

b. Subletting

The Contractor shall not assign, transfer, or sublet the contract, or any interest or part therein, without first receiving written approval from the Town and the bonding company. It shall be mutually agreed and understood that said consent by the Town shall in no way release the Contractor from any responsibility or liability as covered in these Specifications for Reappraisal and Revaluation and the Contract.

4. *Time Schedule*

The revaluation work must be started by July 1, 2015.

a. Completion Dates

The following phases of the revaluation must be completed in accordance with the schedule below.

1. Completed property record cards with all measurements, listings, by August 1, 2016.
2. Pricing, review, and final valuation by November 3, 2016.
3. Assessment notices addressed and prepared for mailing by November 10, 2016.
4. Informal hearings to begin no later than November 27, 2016, to end no later than December 15, 2016.
5. All property record cards, as corrected and finalized after the informal hearings, to be turned over to the Assessor no later than January 1, 2017.
6. Completion of the Project shall not be final until either the Assessor certifies the entire Project by signing the appropriate forms, and if applicable, the Contractor fulfills all requirements of the provisions under Connecticut General Statutes 12-62f.

b. Assessment Date

The completed appraisals, upon approval of the Assessor, will serve as a basis for assessment effective on the Grand List of October 1, 2016.

c. Project Timetable

The Contractor is required to submit before the commencement of the Project, the timetable for the entire Project. The timetable must be followed by the Contractor. Any variation of the timetable must have the express consent of the Assessor.

E. PAYMENT SCHEDULE

Payments shall be made in the following manner:

1. At the end of each thirty day period during the period covered by this contract, the Contractor is to certify in writing in the form of a progress report to the Assessor the percentage of the total work completed under the contract which the Contractor has performed during the said thirty day period. Such notification will itemize and accurately indicate the extent and nature of work performed by volume, street, category, or in any other manner required by the Assessor.
2. The Town, upon determination by the Assessor that the certification of the Contractor concerning work during said period is accurate, will pay to the Contractor a percentage of the total compensation under this contract equal to the percentage of work certified as having been performed during said period in accordance with the schedule below, less ten percent (10%) which is to be retained by the Town for payment to the Contractor at such time that it has performed fully and satisfactorily all its obligations, and requirements under the contract. The retained ten percent (10%) of the contract price is to be paid upon the Board of Assessment Appeals completion of its duties on the October 1, 2016 Grand List.

II RESPONSIBILITIES OF REVALUATION CONTRACTOR

The Contractor is responsible for the fulfilling all requirements stated in this Request for Proposal in a timely fashion, and in a professional and satisfactory manner. During the course of this Project, the Contractor shall work cooperatively with and shall provide any reports, invoices, schedules and other information required by this RFP or requested by the Assessor.

A. PUBLIC RELATIONS

The parties of this revaluation Project recognize that good public relations are required in order that the public of the Town may be informed as to the purpose, benefits, and procedures of the revaluation program. The Contractor shall provide reasonable assistance to the Assessor in conducting a program of public information through the press and other media, such as meeting with citizens and property owner groups, as a means of establishing understanding and support for the revaluation program and sound assessment administration. The Contractor shall supply visual aids and other media at its disposal to insure this end. The Assessor shall approve all public releases.

This program will commence prior to the sales data collection effort and continue on a regular basis for the duration of the Project.

B. PERIODIC STATUS REPORTS

The Contractor shall submit to the Assessor monthly status reports as well as any work completed that is to be reviewed by the Assessor. The report shall contain specifics as to the work completed and the work to be done in the next month. The Assessor shall review and evaluate the progress of the Project, and shall notify the Contractor whether the work performed is satisfactory and timely.

C. DATA COLLECTION OF BUILDINGS AND STRUCTURES

1. *Measuring & inspecting of all real property*

a. Physical details

The Contractor will verify or correct the complete listing of all physical details for all residential, commercial and industrial buildings and all structural improvements attached to each parcel. Listing will include all interior and exterior construction details, quality of construction, age and condition.

b. Sketches

Contractor will verify or correct the sketch of all major buildings and physical improvements.

c. Photographs

Photographs of all properties (provisions for photographs are already in place in the existing CAMA system).

d. Inspection

Contractor guarantees to make an internal inspection of at least 95% of all properties.

Excluded will be those properties wherein the owner refuses inspection or fails to respond to contractor's notification letter. For each property above the allowable 5% which is not properly inspected, the Assessor may deduct \$25.00 from the contract price to be paid to the Contractor; such amount deemed by the parties hereto to be a fair and equitable estimate of damages to the Town.

1. Verification

Contractor's listers will have each interior inspection verified by requesting that an adult owner, resident of building or building manager sign and date field card. The lister will also initial each field card to record the measuring and listing of the parcel.

2. Refusals

When entrance to a building is refused, Contractor's lister will make note of this and report weekly to the Assessor with names, addresses and reason for refusal. The Assessor shall review information and if he/she is unable to gain the cooperation of the party involved, he/she will notify the Contractor and the Contractor will estimate or use the best information available to determine the contents of the building.

3. Notification

If the initial visit results in no contact with the property owner, the Contractor shall send notification via first-class mail notifying the property owner that the representative of the Contractor was not able to make contact and request that within a prescribed time limit, the property owner contacts Contractor by telephone or by mail for alternative arrangements

for the inspection of the property. Failure of the property owner to respond to the notification letter will place this parcel in the 95% entry group.

III VALUATION APPROACHES

1. Market Approach

The Contractor must describe in detail its particular methods for generating values with the market value approach. The comparative sales approach or a statistical modeling approach are the two preferred techniques. If a statistical modeling approach is employed, the Contractor must specify the techniques employed and the types of property that will be valued with these techniques. If the direct sales comparison method is employed, all adjustment techniques must be described by the Contractor in its Proposal.

a. Sales Verification

The validity of all sales for the past two (2) years shall be determined by the company and Assessor. These validated sales will be the basis for the comparable sales approach for the residential properties.

The Contractor shall develop and provide the Assessor with written documentation for the sales verification effort.

2. Cost Analysis

The Contractor shall derive a value for real property by estimating the current cost to replace or reproduce the existing structure, deducting for all accrued depreciation in the property, and adding the estimated land value. The Contractor shall develop cost schedules based on current costs of labor and materials prevailing in the Town during the year immediately proceeding October 1, 2016 valuation date. The updated cost and land schedules shall be in the Vision 6.5 CAMA software format.

3. Income Approach

The Contractor shall determine a value for income-producing property by converting anticipated income into a property value. The Contractor shall capitalize out income expectancies at a market-derived capitalization rate or a capitalization rate that reflects a specified income pattern, return on investment and change in the value of investment.

4. Land Valuation

The land values will be derived from market sales and/or land residual analysis. The land values will be set by the Contractor and reviewed by the Assessor. In the event of any disagreement between the Assessor and the Contractor, the Assessor shall have the final decision confirming all land values and methods. Both full value and the 490 value, if applicable, shall be calculated by the Contractor. The land value shall be in a format compatible with the Vision 6.5 CAMA system.

5. *Neighborhood Delineation*

The Contractor, with the assistance and approval of Assessor will delineate the Town into valuation neighborhoods. These neighborhoods will be determined by analysis of the market factors needed to select comparable sales for the sales comparable approach to value. Boundaries such as highways, natural, economic conditions & zoning etc., shall be considered. Existing neighborhoods will be reviewed and modified as applicable.

6. *Depreciation Analysis*

The Contractor shall develop percent good tables to explain the loss in the value of the improvements from physical, functional and economic causes. A comparison of the physically depreciated replacement cost of sample properties, plus the land value with the value produced via income analysis, or sales comparison, will assist in the development of functional and economic obsolescence guides by type of property and location. The end product will be percent good tables which consider structure age, condition, desirability and utility. The analysis will be reviewed with the Assessor and a copy will be provided at the completion of the Project.

IV VALUATION OF REAL ESTATE

The Contractor will calculate a value estimate for each parcel that will be comprised of a land, building, outbuildings, and total value. The final value shall reflect 70% of fair market value as of October 1, 2016.

A. RESIDENTIAL PROPERTIES

The Contractor will work with the CAMA provider to produce cost and market estimates of value. Prior to field review, the Assessor will approve any updates to the existing methodology.

B. COMMERCIAL AND INDUSTRIAL PROPERTIES

The appraisal of income producing properties relies heavily on an analysis of what the prudent investor would pay for a given property based on the income stream that the property could reasonably be expected to produce. In this regard, the actual income/expense information for each property will be collected and analyzed to arrive at a capitalization rate reflective of the market environment.

The Town of East Hartford will be responsible for the collection of these income/expense forms, while the Contractor will be responsible for the analysis of this data.

Capitalization rates shall be developed by type of property, and location. When the Assessor has approved capitalization rates and techniques, the Contractor shall perform income approaches using economic income and expense data.

C. *PRE-VALUATION REVIEW*

Experienced Contractor's staff will perform a full pre-review of data that is on the CAMA file. During this step, adjustments to grade, functional/economic adjustment factors and other subjective data elements may be made to better reflect market trends within the Town. The reviewer will also, verify observable objective data elements and adjust or correct the data as appropriate. The Assessor's Staff will work closely with the Contractor's reviewers verifying consistency of data elements. Units of comparison will developed for various property types to maintain equity.

D. *VALUATION FIELD REVIEW OF VALUES*

The Contractor will field review all parcels after value generation. The Contractor is responsible for the review of value estimates for all real property parcels to verify that the application of the valuation methodology employed has resulted in the uniform and consistent valuation of comparable properties.

The Contractor shall be required to submit final values in a timely manner to be determined by the Assessor. The Contractor will record on the CAMA data file the source of the final appraisal value (cost, market, income, appraiser override, etc.) and the date the final valuation was made.

Individuals conducting this phase of the program must be certified by the State of Connecticut Revaluation Certification program for the type of property they will be reviewing. During review if valuation changes are made due to data error, the data will be corrected on the property file.

The Contractor shall provide the Assessor with written procedures for the conduct of valuation field review at least ten (10) days prior to the scheduled date for the commencement of the valuation field review.

E. *ASSESSMENT NOTICES*

At the close of the revaluation, a notice shall be sent at the Contractor's expense including envelope, by first class mail, to each owner of record, setting forth the valuation that has been placed upon the property identified in the notice.

The notice shall be prepared in duplicate and in conformity with the Connecticut General Statutes, as from time to time amended. Further, enclosed with such notice shall be a letter specifying the dates, times, and place of the informal public hearings with an explanation as to the appeal process. Such notices and letters shall be subject to the approval of the Assessor. A duplicate copy of all letters sent shall be arranged in alphabetical order by street order left with the Assessor. Where applicable, a letter shall be enclosed to explain the benefits of and the effect on the new assessment for properties classified as FARM, FOREST, or OPEN SPACE.

F. INFORMAL PUBLIC HEARINGS

1. At a time mutually agreeable to the Assessor and the Contractor following completion of all review work by the Assessor and the Contractor, the Contractor shall hold public hearings so that property owners, or their legal representatives, may appear at specified times to discuss their new assessments with qualified members of the Contractor's staff.
2. The Contractor, in conjunction with recommendations of the Assessor, shall schedule a sufficient number of hearings and provide adequate personnel to handle said hearings expeditiously and fairly. Any information offered by the taxpayer shall be given consideration and adjustments shall be made when warranted.
3. The Contractor shall have an adequate number of days for the informal public hearings; said hearings shall include evenings and Saturdays. Every property owner shall have the opportunity to an informal hearing with the Contractor within said period of time, agreed upon, by the Assessor and the Contractor.
4. The Contractor shall mail a notice which reflects the result of the informal hearings at the Contractor's expense. The Assessor, prior to mailing, must approve this notice. A duplicate copy of such notice shall be submitted to the Assessor.

G. BOARD OF ASSESSMENT APPEALS

The Contractor shall have a qualified member or members of its staff available for attendance at any deliberations of the Board of Assessment Appeal meetings to be held after the completion of the revaluation, Sundays excluded, but such availability and attendance shall not be required after the date, including any permitted extension, for the completion of the duties of the Board of Assessment Appeals on the October 1, 2016 Grand List, to assist in the settlement of complaints and to explain the valuations made.

H. LITIGATION

In the event of appeal to the courts, if requested, the Contractor shall furnish a competent witness or witnesses Town in the defense of the valuation of the properties appealed, at a rate not exceed \$550 per day.

I. INFORMATION

The Contractor shall give to the Assessor any and all information, including but not limited to, pricing schedules, hearing information etc., pertaining to the revaluation work for a period of one year after completion of the duties of the Board of Assessment Appeals on the October 1, 2016 Grand List without further cost to the Town.

J. TRANSMITTAL OF RECORDS TO THE ASSESSOR

Regular periodic delivery of appraisals, as completed, shall be turned over to the Assessor for review. All appraisals of buildings either completed or under construction and all completed and corrected records shall be turned over to the Assessor by the dates specified in the schedule agreed upon by the Assessor. All documentation employed in conjunction with this program, including software programs, shall become the property of the Assessor. The final inspection and review shall take into consideration any known or apparent changes in the individual property since it was first inspected in order that the final appraisal of property shall be made as of October 1, 2016.

This information and/or appraisal or record shall not be made public until after the informal hearings, except to the extent that public access may be compulsory under the provisions of applicable law.

K. CERTIFICATION

The Contractor shall meet all requirements set forth in this document and no exceptions and or amendments may be made unless expressly authorized by the Assessor. The Assessor must certify that the values resulting from this Project represent 70% of the fair market value pursuant to section 12-63 of the Connecticut State Statutes. The new values must also meet the performance-based revaluation standards as set forth under provisions of Section 12-62i of the Connecticut General Statutes.

As a condition of a successful Project completion, the Contractor's work product must meet all certification requirements of the Assessor.

V RESPONSIBILITY OF TOWN

A. NATURE OF SERVICE

It is clearly understood and agreed that the services rendered by the Contractor are in the nature of assistance to the Assessor and all decisions as to proper valuations, taxable or tax exempt, shall rest with the Assessor.

B. COOPERATION

The Assessor, the Town, and its employees will cooperate with and render reasonable assistance to the Contractor and its employees.

C. The Town will provide training to the contractor in the format for listing, valuation and review as it pertains to the existing CAMA system which will remain in place for the 2016 grand list.

D. The Assessor's staff will provide data entry of changes from field inspections.

E ITEMS FURNISHED BY THE TOWN

The Town shall furnish the following to the Contractor:

2. Maps

The Assessor shall provide 2 copies of available Assessor maps. The Assessor shall also provide available parcel identification data for each parcel of real property including at a minimum the following items all current legal information, i.e. ownership, property location, mailing address, map/lot number.

3. Land Dimensions

The Assessor shall be responsible for providing accurate lot sizes and total acreage of all pieces of property where the Assessor maps or present records fail to disclose measurements or acreage.

4. Zoning

The Town shall provide current Town zoning and planning regulations and zoning maps.

5. Property Transfers

The Town shall notify the Contractor on a regular basis, of transfers and property splits occurring after said date. The Town shall update the CAMA database.

5. Data Inventory

The Town will provide a CAMA database information current to the Grand List of October 1, 2014.

6. Building Permits

Records of all building permits issued during the course of the Revaluation Project up to October 1, 2016. All such records shall be returned to the Town.

7. Mailing Address

The Assessor shall provide through the Assessor and/or the Tax Collector's Office the last known mailing address of all property owners.

8. Office Space

Office space, as available, will be provided to the Contractor to carry out the terms of this contract.

9. *CAMA Software*

The Town will provide for the use of the Vision 6.5 CAMA system for the execution of the Contractor's duties on this Project.

10. *Computer Hardware*

The Town will provide the computer hardware necessary for the data management, valuation processing, and printing needs of the Project. The contractor will specify its hardware needs in its proposal.

D. AWARD

The Town reserves the right to reject any, or any part of, or all Proposals; to waive informalities and technicalities; and to accept the Proposal which the Town and the Assessor deems to be in the best interest of the TOWN, whether or not it is the apparent lowest dollar Proposal.

Consideration in the awarding of the CONTRACT will be given to price, prior experience and competence of the Contractor, the nature and size of the Contractor's organization and familiarity with the area, and the quality of similar Projects the Contractor has completed in the past.

PROPOSAL FORM

The company hereby proposes to furnish the services and materials required to complete the aforesaid CONTRACT and CONTRACT SPECIFICATIONS for the Total Amount of:

OPTION #1: Revaluation of all properties.

OPTION #2: Revaluation of all properties other than the industrial properties currently owned by Pratt and Whitney Aircraft located at 400 Main Street, Pent Road, and Colt St.

OPTION #3: Revaluation of all properties including those currently owned by Pratt and Whitney Aircraft located at 400 Main Street, Pent Road, and Colt St. These three properties will be done in the format of a long form narrative appraisal report.

*OPTION #4: Revaluation only of Pratt and Whitney properties at 400 Main Street, Pent Road, and Colt St. in the format of a long form appraisal report.

OPTION:

(1) \$	_____
(2) \$	_____
(3) \$	_____
(4) \$	_____
	(Written Dollar Amount)

- NOTE: Companies may bid Options 1-3 inclusive or Option #4 without bidding Options 1-3.

Companies bidding only Option #4 need not attend the pre-bid conference.

COMPANY NAME _____

BY: NAME & TITLE _____ SIGNATURE _____

ADDRESS _____ ZIP CODE _____

TELEPHONE # _____ FAX # _____

EMAIL ADDRESS _____

ADDENDUM #1
TOWN OF EAST HARTFORD
PROFILE OF GRAND LIST 10-1-14
APPROXIMATE NUMBER OF PARCELS

A. TAXABLE PROPERTIES:

<u>CATEGORY</u>	<u>ACCOUNTS</u>	<u>ASSESSED VALUATION</u>
1. Vacant land	530	18,242,385
2. Residential (1-4 Family)	12,416	1,370,964,673
3. Residential (Condos)	1,459	89,603,142
4. Condo garages	104	364,000
5. Mobile homes	538	10,653,286
6. Mixed use (Res/Bus)	34	4,923,215
7. Apartments (5units + up)	73	114,371,479
8. Commercial condos	6	435,300
9. Commercials	454	372,530,285
10. Industrials	269	241,212,824
11. Public utilities	54	1,569,460
12. Farm/Forest	36	289,920
TAXABLE TOTAL	15,973	2,225,159,969
B. EXEMPT PROPERTIES:		
1. Town	229	182,918,018
2. State	58	75,533,580
3. Federal	2	1,321,030
4. Other exempt	105	184,894,505
EXEMPT TOTAL	394	444,667,133
TOTAL	16,367	2,669,827,102

ADDENDUM #2
INSURANCE REQUIREMENTS

A CERTIFICATE OF INSURANCE WILL ONLY BE REQUIRED OF THE AWARDED BIDDER

INSURANCE INDEMNIFICATION CLAUSE

The Town of East Hartford, CT is to be named as an “**additional insured**” and an additional insured policy endorsement must be submitted with the certificate of insurance and the nature of the project is to be stated on the certificate.

INDEMNIFICATION

AGENCY agrees to indemnify and hold the Town of East Hartford, CT harmless against and from any and all claims by or on behalf of any person arising from or in connection with:

A: Any act, error, omission, negligence or fault of **AGENCY** or any of its agents, servants, employees and sub-contractors.

B: Any accident, injury or damage whatsoever caused to any person occurring during the performance of this contract.

Further, the **AGENCY** agrees to indemnify and hold harmless the Town of East Hartford, CT against and from all reasonable costs, counsel fees, expenses and liabilities incurred in or with respect to any such claim and any action or proceeding brought thereon; and in any case any action or proceeding shall be brought against the contractor by reason of any such claim, contractor upon notice from the Town of East Hartford, CT agrees to resist and defend such action proceeding, unless **AGENCY** causes the same to be discharged and satisfied.

A. **GENERAL REQUIREMENTS**

The **AGENCY** shall be responsible for maintaining insurance coverage in force for the life of this contract of the kinds and adequate amounts to secure all of the **AGENCY** obligations under this contract with an insurance company(ies) with an AM Best Rating of A-VII or better licensed to write such insurance in the State of Connecticut and acceptable to the Town of East Hartford, CT

The insurer shall provide the Town of East Hartford, CT with **Certificates of Insurance signed by an authorized representative of the insurance AGENCY(ies)** prior to the performance of this contract describing the coverage and providing that the insurer shall give the Town of East Hartford, CT written notice at least thirty (30) days in advance of any termination, expiration, or any and all changes in coverage. Such insurance or renewals or replacements thereof shall remain in force during the **AGENCY** responsibility under this contracts.

The **AGENCY** at the **AGENCY’S** own cost and expense, shall procure and maintain all insurance required and shall name the Town of East Hartford, CT as Additional Insured on all contracts, except Workers’ Compensation and Professional Errors & Omissions coverage’s.

B. SPECIFIC REQUIREMENTS:

1) Workers' Compensation Insurance

The **AGENCY** shall provide Statutory Workers' Compensation Insurance, including Employer's Liability with Limits of:

\$100,000 Each Accident
\$500,000 Disease, Policy Limit
\$100,000 Disease, Each Employee

2) Commercial General Liability Insurance

The **AGENCY** shall carry Commercial General Liability Insurance (Insurance Services Officer Incorporated Form CG-0001 or equivalent). As per occurrence limit \$1,000,000 is required. The Aggregate Limit will be not less than \$2,000,000. Any deviations from the standard unendorsed form will be noted on the Certificate of Insurance.

3) Business Automobile Liability Insurance

The **AGENCY** shall carry Business Automobile Liability Insurance (Insurance Services Office Incorporated Form CA-00001 or equivalent). A per occurrence limit of \$1,000,000 is required. "Auto Auto" (symbol 1 or equivalent) is required. Any deviations from the standard unendorsed form will be noted on the Certificate of Insurance.

C. **OTHERS: PROFESSIONAL SERVICES – ARCHITECTS, ENGINEERS, ET AL.**

The **AGENCY** shall carry Errors & Omissions coverage in the amount \$1,000,000 per occurrence for all **professional services contracts only**. If the insurance coverage is written on a claims made basis, an extended reporting period of at least 3 years after substantial completion of the project is required.

The Town reserves the right to amend amounts of coverage required and type of coverage provided based on work or service to be performed.

D. SUBCONTRACTOR'S REQUIREMENTS:

The **AGENCY** shall require its subcontractors and independent contractors to carry the coverages set forth in section B and C above and will obtain appropriate Certificates of Insurance before the subcontractors and independent contractors are permitted to begin work.

The **AGENCY** shall require that the Town of East Hartford, CT be named as Additional Insured on all subcontractors and independent contractors insurance before permitted to begin work.

The **AGENCY** and all subcontractors and independent contractors and their insurers shall waive all rights of subrogation against the Town of East Hartford, CT, and its officers, agents, servants and employees for losses arising from work performed by each on this contract. __

LAST PAGE